



# Germany Market Profile

This summary provides the most up-to-date data available on Germany as it relates to their people and economy, travel related motivations and planning behavior and German visitor profile specific to Arizona.

## GENERAL COUNTRY PROFILE

### POPULATION:

81 million

### INFLATION RATE:

0.9%

### EXCHANGE RATES (EUR PER USD):

0.7489

### GROSS DOMESTIC PRODUCT (GDP):

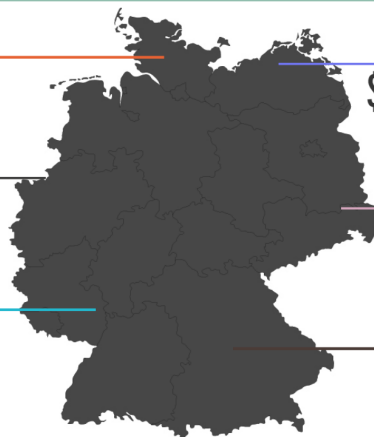
\$3.8 trillion (1.6% annual growth rate)

### EXPORTS:

\$1.5 trillion

### UNEMPLOYMENT RATE:

5%



Source:  
The World Fact Book, reporting 2014 data

## TRAVEL MOTIVATION AND PLANNING



### Top Travel Motivators

**42%** Cultural Historical Attractions

**40%** Shopping

**38%** Dining/ Gastronomy



### Source used in Destination selection for last leisure trip

**60%** Websites via computer or laptop

**45%** Recommendation from family & friends

**37%** Information in printed travel guidebooks

**27%** Advice from travel professionals/travel agents



### Advance Decision Time

**20%** Less than a month

**14%** 1 to 2 months

**34%** 3 to 5 months

**25%** 6 to 12 months

**7%** More than 1 year



### Lodging Reservation made before leaving home

**74%** Yes

**33%** Internet Booking Service\*

**23%** The Lodging Establishment Directly

**30%** Travel Agency/Tour Operator/Travel Club

**2%** Other

**26%** No

\* assume "Internet Booking Service" is an Online Travel Agency (OTA).



### How Air Reservations were Booked

**25%** Directly with Airline

**48%** Travel Agency/Tour Operator/Travel Club

**23%** Internet Booking Service\*

**9%** Corporate Travel Department

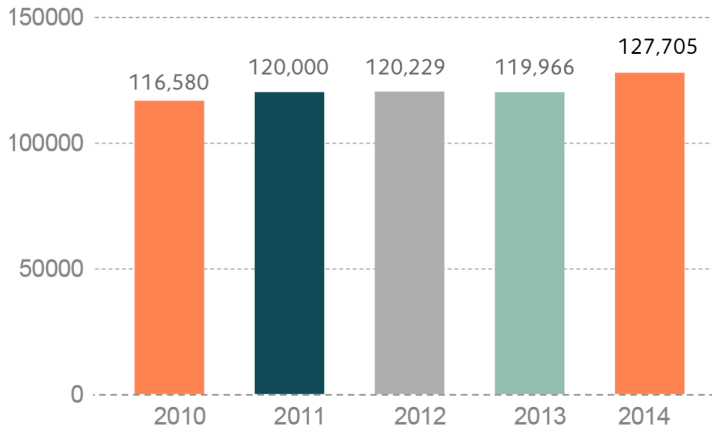
\* assume "Internet Booking Service" is an Online Travel Agency (OTA).

Source:  
Brand USA, reporting 2014 data  
U.S. Dept. of Commerce - NTTO, reporting 2013- 2014 data

# GERMAN VISITATION TO ARIZONA



## Visitation Volume to Arizona



## Visitor Characteristics

**40.8 years**

Average Age

**\$111,649**

Average Household Income

**2.0 persons**

Average Party Size



## Length of Stay

**4.2**

Nights in Arizona

**22.7**

Nights in U.S.



## Port of Entry

**25%** Los Angeles, CA

**18%** San Francisco, CA

**8%** Las Vegas, NV

**10%** Chicago, IL

**8%** Atlanta, GA



## Main Purpose of Trip

**93%** Leisure

**79%** Vacation Holiday

**9.4%** Visit Friends/Relatives

**4%** Education

**7%** Business

**5%** General Business

**2%** Convention/Conference/Trade Show



## Transportation in U.S.

**70%** Rented Auto

**43%** Air Travel between U.S. Cities

**32%** City Subway/Tram/Bus

**26%** Auto, private or company

**20%** Taxicab/Limousine



## Visa Credit Card Travel Spending

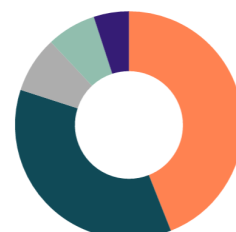
German Visa Card Spending ranked #6 in 2014 with 2.9% of total International Travel Spending in Arizona.

### By Quarter



Q1: 14%  
Q2: 30%  
Q3: 38%  
Q4: 19%

### By Arizona Region



Northern: 44%  
Phoenix & Central: 36%  
West Coast: 8%  
Tucson & Southern: 7%  
North Central: 5%



## Accommodations\*

**71%** Hotel/Motel

**17%** Private Home

**15%** Other

\* since this is collected through a survey, there is no indication if this is paid or non-paid.

Source:

Tourism Economics, reporting 2010-2014 data

VisaVUE Travel, reporting 2014 data

U.S. Dept. of Commerce - NTTO, reporting 2013-14 aggregate data